



# USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

## NATIONAL TURKEY MARKET AT-A-GLANCE

### DOMESTIC MARKET HIGHLIGHTS

The market tone on 8-16 lb. hens and 16-24 lb. toms was steady. Demand was mixed, best for deferred shipments. No trading was reported. Supplies generally adequate. Parts and meats trading was light to moderate. Price trends remain mixed. Offerings were in a full range.

### EXPORT MARKET HIGHLIGHTS

Trading was slow. Demand was light. Buyers slow to purchase and showing some resistance to current price levels.



**WHOLE YOUNG TURKEYS**, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **MARCH 18, 2004**

CURRENT SHIPMENTS 2/					FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	61-64	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	62-64	-	-	-	-	-	-	800	APR
WESTERN REGION 5/	62-64	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59-61	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	-	-R
WESTERN REGION 5/	60-62	-	-	-	-	-	-	-	-

**WHOLE YOUNG TURKEYS**, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **MARCH 19, 2004**

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	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	61-64	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	62-64	-	-	-	-	-	-	-	-
WESTERN REGION 5/	62-64	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59-61	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	-	-
WESTERN REGION 5/	60-62	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

**WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS**, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF MARCH 19, 2004	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	62.50 **	61.43	62.00
CENTRAL REGION	63.00 **	62.80 **	61.00 **
WESTERN REGION	63.00 **	63.00 **	61.50 **
16-24 LB TOMS			
EASTERN REGION	60.00 **	59.00	59.00
CENTRAL REGION	61.00 **	60.90 **	58.50 **
WESTERN REGION	61.00 **	60.80 **	58.50 **

\*\*BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,  
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	68-69
FROZEN TURKEYS Y TOMS 14-24#	66-70
FROZEN TURKEYS Y TOMS 24-28#	70-77

**SAN FRANCISCO PROCESSED TURKEY  
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	109-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	105-130

**FRESH TURKEYS WITH TIMERS OR EQUIVALENT**

U.S. GRADE A DELIVERED FIRST RECEIVERS, EASTERN REGION,  
CENTS PER POUND, WEEK OF 22-MAR-2004

	(8-16#) HENS PRICE	(16-24#) LBS TOMS PRICE	(16-24#) LBS PRICE
SALES (PROMOTIONS INCLUDED)	71.86	232	65.80
SALES (PROMOTIONS NOT INCLUDED)	71.86	232	65.80
SALES (PROMOTIONS ONLY)			
SALES (PRICE TO BE DETERMINED)			

**TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)  
SLAUGHTER-CERTIFIED RTC TURKEYS**

FEBRUARY	373,263*
MARCH 1-13, 2004	193,425*
To date 2004	945,641*
To date 2003	1,015,773*

\* PRELIMINARY

**NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTS**

BY GEOGRAPHICAL AREAS W/E 13-Mar-2004  
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

	<u>YOUNG TURKEYS</u>			<u>TOTAL TURKEYS</u>		
	PCT CHG	AVG LIVE WT	OLD BANDED		AVG LIVE WT	
-THOUSAND HEAD-	PW			-THOUSAND HEAD-		
N EAST	866	-15	22.99	(A)	868	22.99
SATL	740	14	31.17	(A)	742	31.17
N CENT	1,888	1	32.65	(A)	1,889	32.65
S CENT	478	-3	20.46	(A)	479	20.46
WEST	333	11	23.49	(A)	334	23.49

U.S. TOTAL 4,305(B) 0 28.38 7 4,312 28.38  
TO-DATE

2004 41,846(B) 88 41,934  
TO-DATE

2003 44,091(B) 146 44,237  
(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 70,000

for the year 423,000; last year to date 620,000.

**LIVE TURKEYS SLAUGHTERED**

	<u>YOUNG</u>		<u>OLD</u>		
	HENS	TOMS	BREEDERS	TOTAL	
	<u>THOUSANDS</u>				
HEAD	1,646	2,589	70	7	4,312
AVG WT	15.95	36.37	25.55	23.16	28.38
LAST WEEK	1,729	2,515	73	24	4,341
SAME WK YR AGO	1,736	2,757	46	25	4,564
AVG WT	15.88	36.34	25.63	31.97	28.42
TO-DATE/2004	16,843	24,580	423	88	41,934
TO-DATE/2003	17,189	26,282	620	146	44,237

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**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT**, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 18 MARCH 2004.

White meat market steady to instances firm. Demand fair to good with offerings held with confidence. The undertone on 4-8 lb. breasts was mostly steady, institutional breasts fully steady. Demand slow to moderate on consumer sized breasts, fair to good on institutional sizes. Offerings of 4-8 lb. breasts were uneven with some held with more confidence than others, institutional sizes light at best. The export thigh meat market was firm for some as they try to recover costs from new export requirements while others rate the market steady. The reduced number of approved suppliers for some destinations has also created additional export strength. Domestic trading was heavy on 4-8 lb. breasts for March-December, 2004 shipments and on fresh mechanically separated turkey for current deliveries, balance light. Export trading centered on moderate volumes of tails and thigh meat. For domestic (fresh): wing meat 101, scapula 105, breast trim 103-105 cents delivered. For export: hen drums 49, frozen 15-20% +30 days age MST 24-25, fresh thigh meat 91-92 cents delivered.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/	92.00		92.00	1,440
BREASTS, 4-8 LBS GRADE A--FRESH 2/	156.00		156.00	20
BREASTS, 4-8 LBS PLANT GRADE 2/	79.00-84.00		81.99	920
DRUMSTICKS, TOM	47.00		47.00	20
DRUMSTICKS, TOM--FRESH		T	53.33	120
DRUMSTICKS, HEN	49.00		49.00	5
WINGS, FULL-CUT, TOM	47.00		47.00	20
WINGS, FULL-CUT, HEN	46.00		46.00	9
WINGS, V-TYPE, TOM	30.00-37.00		33.11	123
WINGS, V-TYPE, HEN	81.00		81.00	14
NECKS, TOM	59.00-60.00		59.95	42
NECKS, HEN	62.00		62.00	14
BREASTS, B/S, TOM 3/				
BREASTS, B/S, TOM--FRESH 3/	190.00-193.00		191.42	240
THIGH MEAT	90.00		90.00	40
THIGH MEAT--FRESH		M	91.00	120
BREAST TRIM MEAT		M	100.00	80
SCAPULA MEAT		T	97.00	40
TENDERLOINS				
DESTRAPPED TENDERS	166.50		166.50	120
DESTRAPPED TENDERS--FRESH	189.00		189.00	40
WING MEAT WITH SKIN	95.00		95.00	40
MECHANICALLY SEPARATED 4/		W	32.00	40
MECHANICALLY SEPARATED--FRESH 4/	36.00-37.00		36.06	680

#### EXPORT TRADING

DRUMSTICKS, TOMS	49.00		49.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	33.00		33.00	446
MECHANICALLY SEPARATED 4/		T	32.50	40
THIGH MEAT - FROZEN	86.00-95.00		90.42	596

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 19 MARCH 2004.**

The white meat market continued steady to firm. Demand fair to good. Offerings of fresh tom breast meat ranged from short to instances adequate for buyers' needs, but were held with confidence. The balance of white meat offerings were light at best. The trade sentiment on tom drums was barely steady to instances weak with processors continuing to watch for any export market developments. The undertone on tom 2-joint wings was barely steady at best, tom full-cut wings and necks were steady. The market was steady to instances firm on mechanically separated turkey (MST) with some unsettledness noted. Domestic demand was good on fresh MST, light to fair into export channels. Offerings of fresh MST were light at best, frozen mixed with export availability dependant on destination. The market on tom defatted gizzards was steady to barely steady with some noting offerings at lower trending price levels. Domestic trading centered on fair volumes of white meat and tom drums, balance light. Export trading was fair on frozen thigh meat.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY	
					WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		R	92.00	1,440	92.10	2,040
BREASTS, 4-8 LBS GRADE A--FRESH 2/	150.00		150.00	129	150.81	149
BREASTS, 4-8 LBS PLANT GRADE 2/		R	81.99	920	81.99	920
DRUMSTICKS, TOM	45.00-47.00		46.39	264	47.54	386
DRUMSTICKS, TOM--FRESH		T	53.33	120	53.33	120
DRUMSTICKS, HEN	44.00		44.00	80	44.29	85
WINGS, FULL-CUT, TOM	47.00		47.00	20	47.00	49
WINGS, FULL-CUT, HEN		R	46.00	9	46.00	9
WINGS, V-TYPE, TOM		R	33.11	123	33.47	167
WINGS, V-TYPE, HEN	84.00		84.00	27	82.98	41
NECKS, TOM	60.00-61.00		60.12	121	60.18	341
NECKS, HEN		R	62.00	14	60.09	46
BREASTS, B/S, TOM 3/			189.53	342	190.85	885
BREASTS, B/S, TOM--FRESH 3/	188.00-190.00	R	90.00	40	90.00	40
THIGH MEAT	90.00-92.00		90.83	240	90.89	360
BREAST TRIM MEAT		M	100.00	80	100.00	80
SCAPULA MEAT		T	97.00	40	97.00	40
TENDERLOINS						
DESTRAPPED TENDERS	170.00		170.00	280	168.22	640
WING MEAT WITH SKIN	100.00-102.00		100.67	60	96.88	170
DESTRAPPED TENDERS--FRESH	185.00-190.00		186.48	135	187.06	175
MECHANICALLY SEPARATED 4/		W	32.00	40	32.79	66
MECHANICALLY SEPARATED--FRESH 4/	35.00-38.00		35.83	327	35.92	1,357
EXPORT TRADING						
DRUMSTICKS, TOMS		R	49.00	40	48.28	144
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		R	33.00	446	33.00	446
MECHANICALLY SEPARATED 4/		T	32.50	40	32.50	40
THIGH MEAT - FROZEN	89.00-90.00		89.42	240	89.08	1,276

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

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3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.